
PURCHASING USER MANUAL	1
APPROVING A PURCHASE ORDER	1
INTRODUCTION	1
TO APPROVE A PURCHASE ORDER.....	1
TO PRINT, SAVE, OR E-MAIL A PURCHASE ORDER	3
TO REJECT A PURCHASE ORDER	4
TO VOID A PURCHASE ORDER	4

PURCHASING USER MANUAL

APPROVING A PURCHASE ORDER

INTRODUCTION

The agency administrator can enable “PO Approver Required” and assign users as “PO Approvers” so that purchase orders must be approved before they are ordered. The PO Approver can review, make some changes, and order the items or allow the purchaser to place the order. The PO Approver can also reject the purchase order back to the purchaser. Each agency can develop their own internal rules for PO Approvers.

TO APPROVE A PURCHASE ORDER

1. From the **PO Status** screen, select a purchase order with a status of **Ready for Approval**. (If desired, select **Ready for Approval** from the **Status** drop-down menu and click **Find**.)

Figure 1 - PO Status

The screenshot shows the 'PO Status' screen with a table of purchase orders. The 'Approve' button for PO #0901 is circled in red, and the status 'Ready for Approval' for that PO is also circled in red.

PO #	Required by	Vendor	Status
Select 009TV	04/28/2008	BEST BUY STORES LP	Some items received
Select 6235-Sx		OPTICAL SURVEILLANCE SYSTEMS INC.	All items ordered
Select D8000-PO		BOISE TIRE COMPANY INC	All items received
Edit PO900		GARDEN CENTER WEST INC	In Purchasing
Approve PO901		BENCHMARK	Ready for Approval
Select WKP80003		CLOS OFFICE SUPPLY INCORPORATED	Some items received

2. Click **Approve** next to the purchase order. The purchase order will open on the **PO** screen.

Figure 2 - PO details

The screenshot shows the 'PO details' screen for PO #0901. The 'Approve' button is circled in red, and the status 'Ready for Approval' is also circled in red.

Department: R&D: Research and Developer
PO # PO901
Vendor # 382349724 -00 BENCHMARK
State Contract
Required Delivery
Not Invoiced
Vendor Notes
PO Atch
Status: Ready for Approval
Total: \$175.00
PO Created JAMES CARTER (04/24/2008)
PO Edited JAMES CARTER (04/24/2008)
View Selected Items
Vendor Info
Coding Info
Receiving Info
Clear

Sel	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U.M.	Price	SubTotal
✓	Menu 000123	04/25/2008			Assigned to PO		LED Lamps	5	Each	19.00	95.00
✓	Menu 000123	04/25/2008			Assigned to PO		Headlamps	4	Each	20.00	80.00

3. Review the purchase order as needed:
 - a. Click **Print Preview** to view and/or print the entire purchase order in PDF format.
 - b. Click **Vendor Notes** to view or select predefined notes that will print on the purchase order.
 - c. Click **PO Atch** to view any attached documents or to add additional documents related to the purchase order in general.
 - d. Check **Vendor Info** to view the vendor name and address (displayed on each line item).
 - e. Check **Coding Info** to view the fiscal coding on each line item.
 - f. Review the line items for description, quantity, price, etc.
 - g. Click the line item **Notes** icon to view or add any notes specific to the line item.
 - h. Click the line item **Atch** icon to view any attached documents or to add additional documents specific to the line item.
4. Make any changes as needed. PO Approvers can change the **Item, Description, Qty, U.M., or Price**. PO Approvers cannot change fiscal coding.
5. Click **Approve**.
6. Click **Ordered** if you are ready to order the items.

Figure 3 - PO Approver to order

The screenshot shows the PO Approver interface with the following details:

- PO Status** tab is selected.
- Department:** R&D: Research and Development
- PO #:** PO901
- Vendor #:** 382349724
- Vendor Name:** BENCHMARK
- Status:** Approved (circled in red)
- Total:** \$175.00
- PO Created:** JAMES CARTER (04/24/2008)
- PO Edited:** JAMES CARTER (04/24/2008)
- Buttons:** New PO, Save, Print Preview, Ordered (circled in red), Reject, Void PO.
- Table:**

Sel	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal
<input checked="" type="checkbox"/>	Menu 000123	04/25/2008			Assigned to PO		LED Lamps	5	Each	19.00	95.00
<input checked="" type="checkbox"/>	Menu 000123	04/25/2008			Assigned to PO		Headlamps	4	Each	20.00	80.00

When a purchase order is ordered, the Purchasing application will send, at the end of the day, a TC215 to STARS for each line item.

- If the quantity changes for a line item that has not been sent to STARS (i.e., has not been ordered), the quantity for that item is modified in the TC215 that will be sent to STARS.
- When a purchase order is voided, the application will send a TC225 for each line item that has been encumbered. For these line items, if the **MOD** field is blank, STARS will treat it as a partial just as if the user had entered a "P". If the user enters an "F", STARS will finalize it.

- PO Approvers can order the purchase order items. If they do, Purchasers are not *required* to come back to the application again to order the purchase order items. However, each agency can make its own internal rules to decide how their Purchasers and PO Approvers work together.

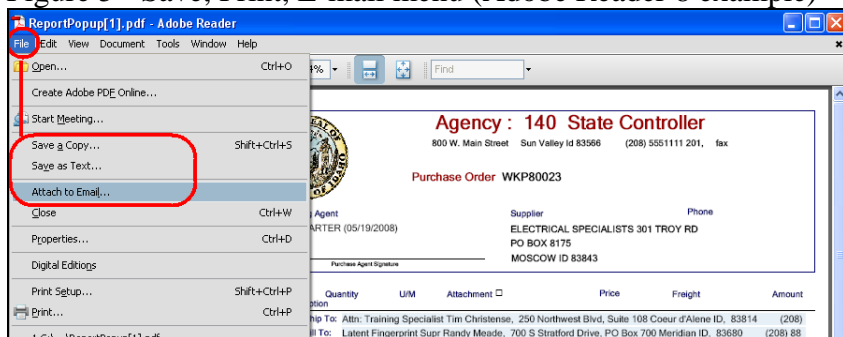
TO PRINT, SAVE, OR E-MAIL A PURCHASE ORDER

To print a purchase order, click **Print Preview**. The purchase order form will be displayed in PDF in a browser window. Depending on your PDF software, click the appropriate icon on the toolbar to print, save, or e-mail the form, or click File, Attach to E-mail.

Figure 4 - Save, Print, and e-mail icons (Adobe 7 Professional example)



Figure 5 - Save, Print, E-mail menu (Adobe Reader 8 example)



To e-mail a purchase order form directly from the PDF screen, you may have to configure Internet Explorer to recognize with your e-mail client. On Internet Explorer:

7. Click **Tools** and select **Internet Options**.
8. Click the **Programs** tab.
9. Select your e-mail client from the **E-Mail** drop down menu.
10. Click **OK**.

Other security policies may be set by your PC or IT administrators to allow the PDF software to connect to your e-mail client. Contact your support personnel for assistance.

TO CLEAR A PURCHASE ORDER

If the purchase order has not been approved, you can **Clear** the purchase order. The automatically assigned tracking number will not be reused. The requisition line items will be available for a new purchase order or the purchase may chose to reject or cancel them.

Figure 4 - Clear the purchase order

The screenshot shows the 'PO Status' screen with the 'PO' tab selected. The status is 'New Purchase Order'. The 'Clear' button is visible in the top right corner. The 'Vendor' is 'BEST BUY STORES LP' and the 'Total' is '\$1,214.94'. The 'Status' is 'New Purchase Order'.

Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal
Menu 65A07003	12/07/2007			Assigned to PO	xy7823-aa	Business cards	1	Box	15.00	15.00
Menu 65A08023	04/30/2008			Assigned to PO		IPODS	6	Each	199.99	1,199.94

TO REJECT A PURCHASE ORDER

The approver can reject a purchase order after it has been approved. The purchase order would go back to the purchaser for changes. On the **PO** screen, click **Reject**. The purchaser can edit and re-save the purchase order, keeping the same purchase order number, vendor information, etc.

Figure 5 - Reject a purchase order

The screenshot shows the 'PO Status' screen with the 'PO' tab selected. The status is 'Ready for Approval'. The 'Reject' button is highlighted with a red circle. The 'Vendor' is 'OPTICAL SURVEILLANCE SYSTEMS INC' and the 'Total' is '\$445.00'. The 'Status' is 'Ready for Approval'.

Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal
Menu 6546-S	04/25/2008			Ordered	333-ABC	Binoculars	3	Each	89.00	267.00
Menu 6546-S	04/25/2008			Ordered	8456AMC	Binoculars	2	Each	89.00	178.00

TO VOID A PURCHASE ORDER

You can void a purchase order before or after it has been ordered, but not if any items have been received. NOTE: If some items have been received and you want to close out the purchase order, you can reject, cancel, or remove the line items not received. The purchase order then shows the status as "All items received".

Voiding the purchase order puts the line items back on the PO screen. The purchaser then has to decide to add them to a new PO, reject them back to the requester, or cancel them. The voided purchase order number cannot be used again.

On the PO screen, click **Void PO**.

Figure 6 - Void PO

The screenshot shows the 'PO' tab selected in the top navigation bar. The main form area contains fields for Department (R&D: Research and Developer), PO # (6235-Sx), State Contract, Vendor # (731459340), and Vendor Name (OPTICAL SURVEILLANCE SYSTEMS INC). There are buttons for 'New PO', 'Save', 'Print Preview', 'Ordered', 'Void PO' (circled in red), 'Vendor Notes', and 'PO Atch'. The status is 'All items ordered' and the total is '\$445.00'. Below the form is a table with columns: Sel, Req #, Need By, Notes, Atch, Status, Item #, Description, Qty, U/M, Price, SubTotal. The table contains two rows of data for 'Binoculars'.

Sel	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal
<input checked="" type="checkbox"/>	Menu 6546-S	04/25/2008			Ordered	333-ABC	Binoculars	3	Each	89.00	267.00
<input checked="" type="checkbox"/>	Menu 6546-S	04/25/2008			Ordered	8456AMC	Binoculars	2	Each	89.00	178.00

When a purchase order is voided, the application will send a TC225 for each line item that has been encumbered. For these line items, if the **MOD** field is blank, STARS will treat it as a partial just as if the user had entered a P. If the user enters an "F", STARS will finalize it.